

Business Outreach, Engagement and Education Services

Scope of Work – Section 0500

Solicitation # MHJ0104

1.0 Purpose

The City of Austin (City) seeks proposals from qualified organizations (Contractor) to fulfill Austin Business Outreach, Engagement, and Education Services in city-wide commercial areas and corridors. The goals of the outreach and engagement efforts will be to educate, empower, and recruit businesses regarding the benefits and opportunities of forming merchants associations and organized business districts.

The services fulfilled by this RFP will be part the Soul-y Austin program: <https://austintexas.gov/soulyatx>. This program is part of the greater commercial stabilization effort within the City's Economic Development Department (EDD). Under the Soul-y Austin program, business owners receive a flexible set of tools to assist the formation and ongoing maintenance of merchants associations. Tools include meeting facilitation, access to legal resources, training, place-making activities, and activation award. This effort seeks to explore business interests, provide education, and recruit businesses to become involved and learn more as part of the Soul-y Austin program. The Contractor will be responsible for outreach and engagement in targeted commercial areas, facilitation of meetings in districts, collecting information and responding to business questions specific to the outreach efforts. The Contractor will work closely with the Soul-y Austin team consisting of subject matter experts, stakeholders, and City of Austin staff.

2.0 Background

Soul-y Austin is the City of Austin's Business District Incubator, established and launched in 2015. The Soul-y Austin purpose is to organize commercial areas into developing self-sustaining merchant associations with targeted education and support services. Soul-y Austin mirrors communities across the country that have employed strategies for commercial stabilization, including supporting the development of merchants associations as a common tool for cultivating thriving businesses in mixed-use districts.

The Soul-y Austin program began with a focus on outreach and education to solicit local business input on the concept of merchant associations. Initial Soul-y Austin outreach was administered in partnership with minority Chambers of Commerce to over 500 businesses and was supplemented by interviews with businesses in pilot commercial districts. The initial outreach to businesses revealed two major themes:

- Businesses were unfamiliar with merchant associations and had minimal experience with merchant associations in the Austin area.
- Businesses were interested in merchant associations when introduced to the concept, and expressed clear interest in many of the services merchant associations typically offer.

Later outreach efforts confirmed business interests in merchant association services, programming, and reinforced the need for a strong educational program combined with intensive grassroots efforts in commercial districts.

Three commercial districts were identified in 2015 for initial Soul-y Austin services, including E. 12th Street, Manor Road, and the Red River Cultural District. Two of these districts have formed their own merchants associations, and the remaining district continues to build leadership and capacity towards a path of merchant association formation. Merchants in these districts have expressed needs such as streetscape improvements and district beautification, shared branding and marketing, safety improvements, and connectivity enhancements. The current participating Soul-y Austin districts have also expressed serious concerns over city regulations and increasing property and rental costs. Soul-y Austin will continue to provide incubation and support services to these three districts to ensure the long-term sustainability and prosperity of their merchant associations. The 2016 phase of Soul-y Austin will incubate three new districts towards the formation of merchants associations and development of commercial area plans.

Business Outreach, Engagement and Education Services

Scope of Work – Section 0500

Solicitation # MHJ0104

Soul-y Austin has provided the following tools to support merchant association development:

- Education and recruitment
- Visioning and district planning services
- Training and coaching on entity formation
- Entity management and maintenance training
- Access to an activation award if an association is formed
- Placemaking funds and support
- Access to façade enhancement matching grants
- Marketing and Promotions
- Market analysis, and use and zoning analysis

Soul-y Austin seeks to educate businesses on the benefits of merchants associations, build capacity and harness a vision for the business district and most importantly, form an organizational structure that provides stability through the formation of a merchants association. Soul-y Austin will allow the City's Economic Development Department (EDD) to further develop programs and policies in support of these newly formed merchants associations. The program will also enable the City to collect additional information on specific concerns that businesses have or potential resources they may see as critical components to their success.

What is a Merchants Association?

A merchants association is a group of business owners that exist to anchor and stabilize neighboring businesses around beautification efforts, marketing and promotions, business retention, and economic development activities within a commercial district. Collectively, merchants associations act as a unified voice and assist in leading and influencing positive change.

Who are the members of a Merchants Association?

Members commonly represent business owners, managers, employees and property owners. Based on the associations' by-laws and business owner consensus, community stakeholders, partners, at-home businesses, artists, musician entrepreneurs, and residents may also be welcome to be part of the association.

How are Merchants Associations formed?

Associations are formed by establishing a legal entity, most commonly seen as a 501c (6) or (3) and may be tax exempt. The legal entity formation allows the association to secure a bank account for financial transactions including fundraising and sponsorship opportunities as well as grant awards. Merchants associations are membership based organizations that support a dues paying structure. These associations are commonly overseen by a Board of Directors, honor a set of association by-laws, and may have an employee(s) facilitating activities approved by the membership and board.

What are the benefits?

Merchants associations provide greater capacity for small businesses and entrepreneurs to thrive within the community. The associations provide job opportunities, business stability, and access to community goods and services. Merchant associations assist in the preservation of unique cultures and environments within the community, promote business retention and provide support services such as marketing, promotions, and beautification efforts. Merchant Associations provide an opportunity for increased sales revenue and taxes, and pedestrian and bike friendly communities through commercial district enhancements.

Business Outreach, Engagement and Education Services

Scope of Work – Section 0500

Solicitation # MHJ0104

3.0 Contractor Qualifications

- 3.1 The selected Contractor shall have two (2) years minimum experience engaging businesses and property owners through outreach efforts
- 3.2 The Contractor shall have two (2) years minimum experience facilitating meetings and presenting information
- 3.3 The Contractor shall be able to communicate in writing, presentation, and dialogue in Spanish.

4.0 Contractor's Responsibilities

The Contractor shall work as an integral member of the Soul-y Austin team. The team consists of city staff, subject matter expert contractors, and external partners. The Contractor is expected to meet with the Soul-y Team as identified in the scope of work and deliverables. The Contractor shall provide technical and professional expertise, knowledge and project management skills, and other resources required for accomplishing all aspects of the Scope of Work. The activities are intended to be inclusive of all business types including chain and franchise stores, small offices, and non-retailers.

4.1 Deliverables Timeline

The Contractor is expected to produce services throughout an initial twelve (12) month process following the execution of this contract. Following the initial contract period, this contract shall include two (2) 12-month renewal options which may include an amended scope of work and budget. The renewal options are dependent upon available funding.

The timeline for specific deliverables shall be finalized in coordination with the City of Austin after a Contractor has been selected.

4.2 Acceptance Criteria

The Contractor must satisfy the requirements of the scope of work per the City of Austin evaluation.

4.3 Deliverables

The Contractor will assist four (4) city wide areas through engaging business and property owners in selected commercial areas as part of this contract. Commercial areas and corridors chosen may vary in size. The contractor will identify and implement new approaches and technologies as appropriate to educate, engage, and motivate businesses to be involved in this effort.

Business Outreach, Engagement and Education Services

Scope of Work – Section 0500

Solicitation # MHJ0104

The Contractor shall complete the following:

- 4.3.1. In partnership with the City, refine educational materials for door to door, email and mailing information as applicable.
- 4.3.2. Produce a project approach and timeline in alignment with the scope of work deliverables.
- 4.3.3. Participate and facilitate district workshops.
- 4.3.4. In partnership with the City, facilitate meetings in districts by preparing agendas and presentation material.
- 4.3.5. Plan, promote, and implement district open houses. Summarize collected information from each open house session.
- 4.3.6. Produce outreach, engagement, and education plans that will guide contacting businesses and property owners in each commercial area.
- 4.3.7. Provide on-going project management and communication to the Soul-y Austin team.

4.4 Task Management

4.4.1. Kick off Meeting

Within two weeks of contractor selection, contractor shall facilitate a kick off meeting with the Soul-y Austin project team to accomplish the following:

- 4.4.1.1. Understand the City's goals of creating and implementing the Soul-y Austin Program as well as the larger Commercial Stabilization Efforts.
- 4.4.1.2. Understand the feedback received from 2015 from districts and other relevant outreach efforts on this program, including themes of business challenges, opportunities, and needs.
- 4.4.1.3. Gain a clear understanding of the Soul-y Austin process and activities specific to engagement and education.
- 4.4.1.4. Gain a clear understanding of current opportunities and tools available through the Soul-y Austin process, as well as policies and programs under development.
- 4.4.1.5. Request any specific data or information needed in order for the Soul-y Austin effort to be successful.

Business Outreach, Engagement and Education Services

Scope of Work – Section 0500

Solicitation # MHJ0104

4.4.2. Project Approach and timeline

Develop a timeline with the Soul-y Austin project team for on-going check-ins with the project team and Project Manager within two weeks of the kick off meeting. Project approach should include all items within the scope of work.

At minimum the project approach plan shall include the following:

- 4.4.2.1. Plan shall suggest approaches that have been successful in other contractor experiences, or within similar work.
- 4.4.2.3. Plan shall consider market trends, hours of operation, translation services needed, and be sensitive to the specific demographics and business types within the selected commercial areas affected by this effort.
- 4.4.2.5. Plan shall consider resources needed including, but not limited to, technology, data, translation services beyond Spanish, etc.
- 4.4.2.6. Plan shall include a timeline for activities within each commercial area in coordination with the project team
- 4.4.2.7. Plan shall include agenda setting, goals, and metrics for success.

4.4.3. Educational Materials and Approach Document

In coordination with the Soul-y Austin team the contractor shall develop educational materials and messaging for engagement and recruitment to businesses to establish merchants associations. Materials should be approved by the City before distribution.

- 4.4.3.1. This work may include graphics or publications including publications translated in Spanish
- 4.4.3.2. An outline for the Educational Materials and Approach Document shall be created in coordination with the pilot initiative team within two weeks of the kick off meeting

4.4.4. Outreach, Engagement and Education Plan

In coordination with the Soul-y Austin team and post kick off meeting, the Contractor shall develop an Outreach, Engagement and Education Plan for pilot areas. The Outreach, Engagement and Education draft shall be produced within two weeks of the kick off meeting. Final delivery of this plan shall occur within a timeline agreed upon by the project team.

At minimum the Plan shall include the following:

- 4.4.4.1. Plan shall suggest approaches that have been successful in other contractor experiences, or similar work types.

Business Outreach, Engagement and Education Services

Scope of Work – Section 0500

Solicitation # MHJ0104

4.4.4.2. Plan shall independently address how property owners and business owners will be engaged and the different approaches as needed, it shall also include information needed to accomplish this task

4.4.4.3. Plan shall consider and be sensitive to the specific demographics and business types within the selected commercial areas, including hours, translation services needed, context in which these businesses would see benefit in this effort

4.4.4.4 Plan shall include the various methods including descriptions proposed for outreach and engagement to both audiences, property owners and business owners

4.4.4.5. Plan shall consider resources needed including but not limited to technology, data, translation services beyond Spanish, etc.

4.4.4.6. Plan shall include a timeline for activities within each pilot area in coordination with the pilot initiative team

4.4.5 Meeting Facilitation, Open Houses and Information Collection

The Contractor will lead or participate in meetings with the commercial districts during the formation process. The Contractor is expected to lead discussion towards the collection of information specific to business type, length in business, employees, business needs, owner/tenant occupied, etc. Information to be collected and approach should be outlined and finalized in collaboration with the Soul-y Austin team. The Contractor is expected to participate and facilitate in 3-5 meetings per district. Meetings will be set giving the Contractor and the COA team time to set agendas and further discuss collaboration on facilitation. The Contractor will be expected to provide a summary of notes per meeting the Contractor facilitates

The Contactor will be expected to host one open house in each district as needed, not to exceed 4 total open houses in 4 different commercial districts. Open house need will be determined by the Soul-y team based on the feedback received from the Contractor on door to door outreach in the specific commercial area.

4.4.6 Report on Outreach, Engagement, and Education Plan

All items outlined in the Outreach, Engagement, and Education Plan for each pilot area as approved by City of Austin, Project Manager assigned to this project are expected to be accomplished within the identified timelines once the timeline has been finalized.

4.4.6.1. An outreach and engagement report comprehensively summarizing all outreach, engagement and educational activities preformed in the pilot areas. The report should include techniques used, lessons learned, successes, challenges, feedback, business outreach metrics and an overall summary of the engagement effort. A template for report may be discussed with the project team.

Business Outreach, Engagement and Education Services

Scope of Work – Section 0500

Solicitation # MHJ0104

4.4.7 District Workshops

Contactor is expected to participate and assist in the facilitation in at least 1 (one) workshop in each district not to exceed 4 total. The workshop will serve several primary functions:

- 4.4.7.1. Solidify key objectives and actionable strategies to inform the commercial area plan
- 4.4.7.2. Express key concerns and recommendations to City of Austin stakeholders and community partners, and establish partnerships toward district improvements
- 4.4.7.3. Discuss new or revised City policies that may be necessary to realize merchant association goals for the commercial district
- 4.4.7.4. Identify place making projects for activation
- 4.4.7.5. Insure that a range of elements appropriate to the district is addressed, potentially including economic development, culture, sustainability, transportation, and the regulatory environment

4.4.8 On-going project management and communication

The Contractor will be responsible for small group discussions and information collection as directed by the Soul-y Austin team.

The Contractor is responsible for on-going communication with both the City of Austin and other members of the project team, including challenges or successes of activities and progress updates. The City of Austin's Project Manager and the project team should be kept abreast of activities throughout the period of this contract. A schedule for regular check-in's should be proposed within the timeline and is expected to include adequate time for meeting agenda setting and Commercial Area Plan edits. Contractor is expected to be part of on-going meetings as needed with the full Soul-y Austin project.

Business Outreach, Engagement and Education Services

Scope of Work – Section 0500

Solicitation # MHJ0104

5.0 City's Responsibilities

- 5.1. The City will provide timely feedback and review of documents and deliverables.
- 5.2. The City will provide Contractor with dates for meetings in a timely manner.
- 5.3. The City will facilitate regular team meetings with the Contractor and share information as applicable.
- 5.4. The City will serve as the lead representative throughout all activities in the scope of work.
- 5.5. The City agrees to inform the Contractor with as much notice as possible when these meetings are scheduled and work with the Contractor on availability.